TRAINER'S HANDBOOK

Jordan/AMIR
Institute for
Banking Studies

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For AMIR/the Institute of Banking Studies

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TRAINING OUTLINE:

TOT IN TRAINING TECHNIQUES AND METHODOLOGIES

TRAINING COURSE OUTLINE & AGENDA

TOT: Training Techniques and Methodologies –Refresher Course

March 30 – April 3

Overall Course Goals

1. To build enthusiasm and confidence of participants in their training skills in anticipation of the training program which follows.

   Measurement- Participants will articulate through evaluation and demonstrate in future training events increased competency and confidence in their training delivery.

2. To review and build understanding for the key components of training –
   - The class – Who they are, trainee expectations, how they learn and the importance of the setting.
   - Methodologies –Specific methodologies and how they fit with the type of material to be taught, course flow and learning style.
   - Materials and Equipment- preparation of materials and physical environment.

   Measurement - Participants will articulate at least one new learning in each of the above categories
   .
3. To practice creation, preparation and training delivery. In addition to practicing delivery, participants will have an opportunity to identify and work with difficult classroom issues.

   Measurement – Selected participants will successfully prepare and deliver a portion of one module. All participants will have practice in giving and receiving feedback.

4. To practice giving and receiving feedback.

   Measurement - Participants will have an opportunity to provide and receive feedback as well as to work with difficult participant environments.

Curriculum Overview and Schedule

Context – Since this is a class about training, time will be spent at the end of each segment to discuss the rationale for the segment, including choice of methodology and impact on learning, materials and physical environment.

We would expect to use materials from the basic course for illustrative purposes. All practice modules will come from the basic course.

It is expected that selected participants would have an opportunity to actually practice delivering a module during the refresher course. Everyone would act as an observer to increase their observation and feedback skills.

March 30th

Day 1
Setting the Stage
3pm – 7pm

Day One will focus on the class and how people learn.

Introduction --   Participant Intros, Course Overview, Ground Rules, Course Materials

Group Discussion -- Who are we training?

> In a large group discussion we will review what folks know about the future participants, how it is relevant to training design and delivery and how to obtain information both before and during the training that might be helpful to good training design and delivery.

Lecture --How People Learn ?

> To illustrate materials see *Training Methodologies: Approaches and Styles*. To illustrate this lecture will briefly review:
>
> a) how people learn, matching listening, observation, articulation, practice and interaction with degree of difficulty and level of knowledge
>
> b) how various individuals learn and readiness to learn will then be matched with methodologies such as lectures, discussions, responding to questions and answers, role plays, case studies, simulations and role plays, tours and observation time.

Practice Problem – Review Choosing Training Methodologies

Set Up Groups for Practice Work on Day 2/3

Mini Lecture--   Ending a Day

Day 2
Preparing and Delivering Training
All Day

Day Two will focus on preparing for training with some opportunities to practice delivering a module segment.

Beginnings

Discussion   **Let's Dissect Preparation and the Training Environment**

- Review the basics about the Physical Environment including
- Equipment and Materials
- The Training Team – Co-training

Lecture/Fish Bowl   **Feedback.- What is it? Why is it Important?**

Practice   **Selected Participants Will Deliver A Portion of A Module**

All students will participate in review and discussion. Module will be a lecture with large group discussion. Video will be used and some students will be designated as observers, while others will continue in their roles as participants.
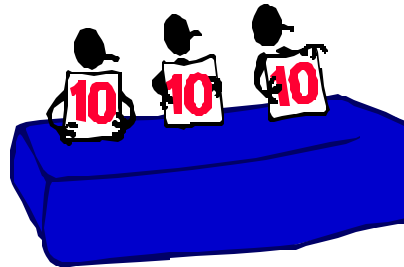
Endings
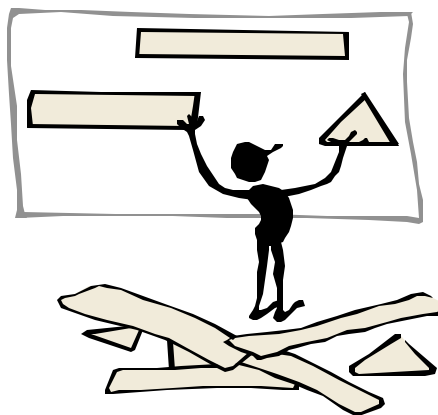
Day 3
Delivering Training/Evaluating the Results
3 pm – 7 pm

Day Three will be a second round of practice and then lecture and discussion about how you modify training in the field.

Beginnings   **Practice**

An alternate group of participants will deliver a portion of a module involving a role play or other practice problem. Others will also change roles so that everyone has a chance to do two of the three roles – trainer, observer or participant.

Lecture   Evaluating Results/Redesigning the Training

Endings   _____

Day 4
Dealing with Group Challenges
3 pm – 7 pm

Day Four will provide participants an opportunity to problem solve using typical but problematic training situations.

Beginnings   Small Group. - Difficult Situations and Difficult Participants

Exercise &   Role-Play

All   Rallying the Trainers

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TEACHING METHODOLOGIES:

APPROACHES AND STYLES

TEACHING METHODOLOGIES:
APPROACHES AND STYLES

There are different methodologies of teaching a class. Every trainer will have his or her own individual style.

Determination of the best methodology or a combination of methodologies for teaching a class depends on five important elements of the teaching process:

➢ personality of the trainer

➢ background and skill base of the trainer

➢ initial level of knowledge of the class and learner maturity[1]

➢ predominant learning style of the participants

➢ the nature of the material to be taught and flow/design of the training.

You have to make the choice of the main methodology for teaching a class based on an

analysis of these five elements.

Some of the most popular teaching methodologies today include some combination of traditional methodologies, interactive methodologies and development methodologies.

The traditional methodologies, like lecturing, involve a higher degree of teacher control of the learning process. More interactive methodologies involve a higher degree of self-directed student learning and control.

Self-directed learning describes the process by which learners make decisions about their learning that might, in other circumstances, have been made by the teacher or trainer.

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[1] Learner maturity refers to the skill of the learner to manager his or her own learning.

Self-directed learning is therefore, in a sense, the opposite of teacher directed learning. It is the process of learner control or a means by which people can learn.

Learner control is usually not a single event. It exists on a continuum with learner control on the one end and trainer control at the other. Most often, some degree of both trainer control and learner control takes place.

**Exercise: Trainer/Learner Control Continuum[2]**
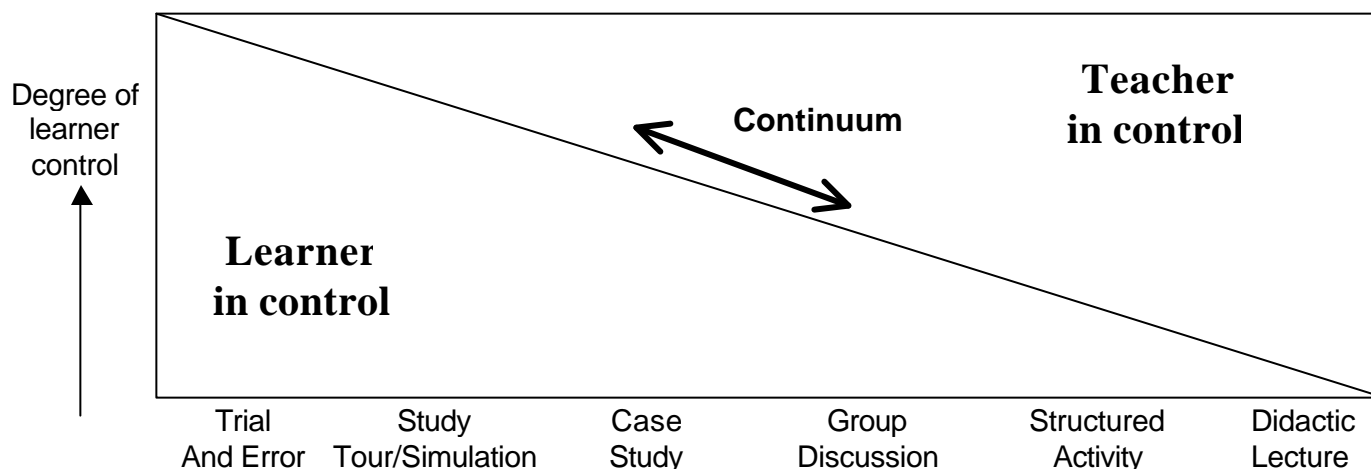
Where on the continuum would you place the following? Explain why. When in a training might you use each & why?

- Trial and error learning

- Lecture

- Case Study

- Group Discussion

- Role Play

- Study Tour / Simulation

- Highly structured activity

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[2] <u>Creating Training Miracles</u>. Alastair Rylatt and Kevin Lohan, Pfeiffer Punblishers, 1997, pg. 69.

Relationship between the trainer and learner control[3]

Trainer
In Control

Learner Maturity
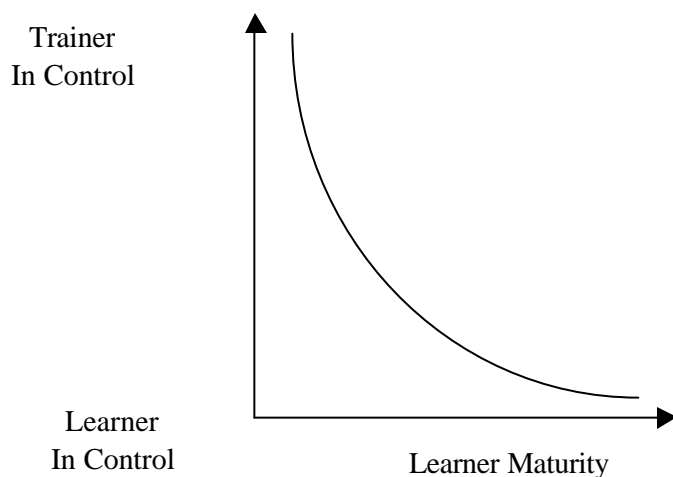
Learner
In Control

Learner maturity refers to the skill of the learner to manage his or her own learning. These skills include issues like setting objectives, identifying resources to help meet the objectives, and assessing personal progress toward the objectives.

Discussion Question:
How would you as a trainer try to assess where on the continuum the training participants lie in terms of learner maturity? Flow of the training? Readiness?

There is significant evidence that adults, like children, learn best by 'doing'. This is the essence of experiential learning.   Interactive and development methodologies (discussed below) lend themselves better to this kind of learning. Additionally this provides the traine r a quick sense of what participants are learning. Also, participants may learn differently. Some hear, others see and some need to touch and engage.

Experiential learning involves a high degree of student interaction and control over the learning process. It allows for some degree of self-directed learning. It can involve a combination of many methodologies, and often puts students in the position of 'real-life' situations.

The trainer often plays the role of facilitator.

Let's discuss the difference between a trainer and a teacher.

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[3] Ibid, pg 73.

Three Basic Teaching Methodologies

1. Traditional methodology

Teacher plays the role of the organizer and main performer in the class presentation

Consists of:

- Teacher's explanations of goals, main concepts

- Illustrations of the topic in the form of individual exercises or examples

- Repetition of the main concepts in the form of various exercises and more active participation from the students

- Teacher makes a conclusion to the topic

Used most often when:

- Teacher makes conscious choice to have a less participative class format (e.g. as mechanism to display authority or control)

- The class has no relevant background in the subject

- The material to be taught is complicated

- For introductory topics to allow the class time for adjustment, if necessary. Additionally, most adults learn initially by hearing and seeing new materials, then practicing and/or using the information.

2. Interactive methodologies

Teacher plays the role of organizer and a participating performer in class. The students are active participants.

Consists of:

- Answers/questions going both ways

- Discussions of topics initiated both by the trainer and the students

- Sharing complementary experiences in the form of presentations, individual and team performances

Used when:

- Students have some relevant background knowledge

- The backgrounds can be different and complementary

- The topics introduced are either not very complicated, or involve repetition of the training material

- It is time in the training flow to change approach to ensure individuals are alert and engaged

3. Development methodologies

Some of the most popular methodologies in this category are problem solving, role playing and team-work. These fit most naturally into and interactive style of teaching. Students are active participants.

Three development methodologies are covered briefly below:

- problem solving,
- role-playing, and
- team work.

All three involve "learning by doing."

Problem solving often involves:

- Setting a task for the students that is based on previously introduced material

- Combining several previously introduced topics

- Formulating a problem that requires combining at least two previous topics and that takes a step toward the next topic

Used when:

- The class has good knowledge of the previous material and abilities of creative analysis (analysis of what they know and establishing the links with other topics)

- As a mechanism to create a common problem for students to solve (team building)

- The trainer would like to assess what participants have learned and reinforce learning or fill in gaps.

Role playing involves *(see separate note on role plays later)*

- Setting an imaginary or real-life environment or situation for the students-experiential learning

- Distributing roles

- Setting the rules of the game (objectives, time, the main direction of the action)

- Deroling and them Debriefing Role Play with participants. A role play may be done using a fish bowl where some participants observe while others are "inrole" or everyone can participate using triads or dyads.

Used when

- The teaching topic has mostly practical applications

- As psychological preparation to the real life situation

- As a lighter, more fun way of learning (often builds camaraderie among students)

Team work involves

- Organizing students in teams using different criteria The criteria is typically a conscious choice to build on some facet of the group, different skills, learning, experiences or participative styles.
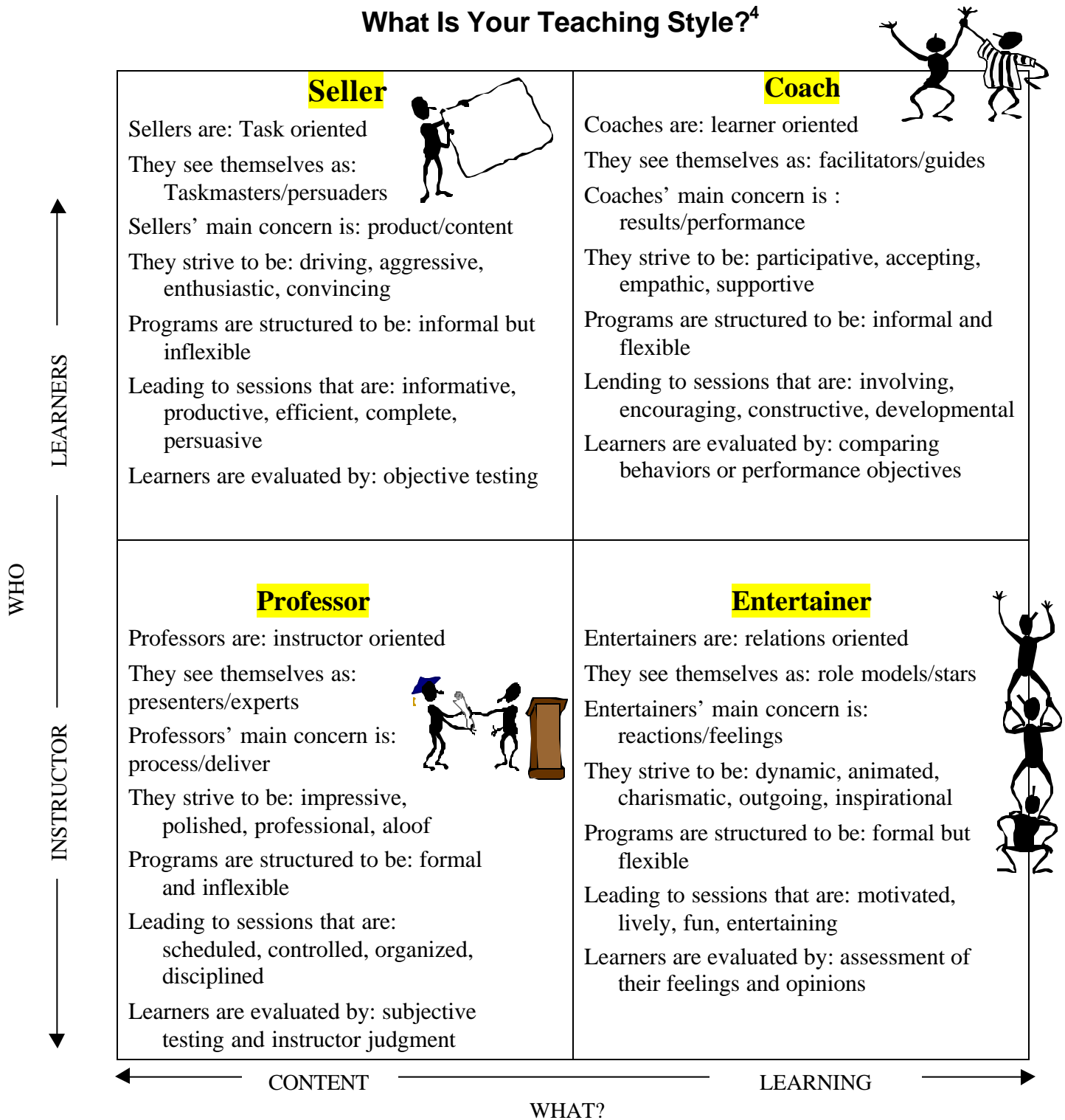
Used when

- Quality decisions have to be made

- Teacher wants cross-learning and active participation of student and reinforce learning

- There is sufficient time

Five Reasons for Using "learning by doing" methods:

1. It improves motivation to learn

2. It improves a person's ability to change

3. It provides improved flexibility in learning

4. It is aligned with what we understand to be the way adults learn most completely

5. Results of learning are easier to identify

What Is Your Teaching Style?[4]

Seller	**Coach**
Sellers are: Task oriented	Coaches are: learner oriented
They see themselves as: Taskmasters/persuaders	They see themselves as: facilitators/guides
Sellers' main concern is: product/content	Coaches' main concern is : results/performance
They strive to be: driving, aggressive, enthusiastic, convincing	They strive to be: participative, accepting, empathic, supportive
Programs are structured to be: informal but inflexible	Programs are structured to be: informal and flexible
Leading to sessions that are: informative, productive, efficient, complete, persuasive	Lending to sessions that are: involving, encouraging, constructive, developmental
Learners are evaluated by: objective testing	Learners are evaluated by: comparing behaviors or performance objectives
Professor	**Entertainer**
Professors are: instructor oriented	Entertainers are: relations oriented
They see themselves as: presenters/experts	They see themselves as: role models/stars
Professors' main concern is: process/deliver	Entertainers' main concern is: reactions/feelings
They strive to be: impressive, polished, professional, aloof	They strive to be: dynamic, animated, charismatic, outgoing, inspirational
Programs are structured to be: formal and inflexible	Programs are structured to be: formal but flexible
Leading to sessions that are: scheduled, controlled, organized, disciplined	Leading to sessions that are: motivated, lively, fun, entertaining
Learners are evaluated by: subjective testing and instructor judgment	Learners are evaluated by: assessment of their feelings and opinions

LEARNERS

WHO

INSTRUCTOR

CONTENT — LEARNING

WHAT?

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[4] Source: The Trainer's Handbook by Karen Lawson, page 48.

Examples of Experiential Learning

Experiential learning is usually used to convey a lesson or learning experience.

There is no limit to the types of experiential learning you can use to encourage students to remember the experience.

As a reminder of what we mean by experiential learning, we have listed some below, some of which we used during the AMIR/IBS training.

Example 1: The Lemon Game – Used for Basic Module 3

All students receive a lemon and are asked to examine it closely and smell and touch and hug and name it. The lemons are then collected and all mixed together and students are asked to go and find their lemon. The teacher then asks each student (or a number of students) how they know it was *their specific lemon* and not some one else's.

Surprisingly, most students *do* find their own lemon (by the shape, color, marks on the skin etc.)

Application: This is a good introduction to character analysis and reference checks, which are both very important for loan officers to conduct on their prospective clients. The loan officer needs to spend face-to-face time with a client, look at him or her from a variety of different angles etc. If the students had not studied their lemon carefully, they may have missed the characteristics which would have helped them identify it.

Example 2: Is There Money Under Your Chair? – Used for Advanced Module 5

Students are asked to raise one hand. Generally everybody does this. Then they are asked to raise both hands. Generally everybody does this too. Then they are asked to lift their chair on top of their heads. Generally, there is laughter and quite a lot of hesitation. But when the teacher convinces students that there is money stuck on the bottom of some of the chairs (which the teacher put there before the class), some students start lifting them up and finding the money.

Application: Employees, loan officers and clients are all happy to do the easy things. They often need incentives to do those tasks that are more demanding. This is a good introduction to a lesson on performance incentives.

Example 3 : Selling Your Shoe (or anything else) – Used for Basic Module 2 or Module 6

Participants are put in groups and given an object (like a lipstick or old shoe) and are asked to prepare to sell the item to the rest of the class. They are given five to 10 minutes to prepare.

Application: Useful for session marketing loans. Need to know your product and its characteristics very well. Need to know to whom you are selling, and what selling points will be most important to them. Need to close the deal.

References for Experiential Training Games/Exercises (WWW.AMAZON.COM)
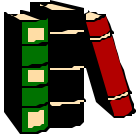
The books listed below have games and exercises, many of which can be adapted for experiential learning situations. Alternatively, they can simply be used to have fun in class, and/or to build class unity, interaction or competition.

The Complete Games Trainers Play (Games Trainers Play Series Vol. 2)

Edward E. Scannell, et al/Hardcover/Published 1998

The Complete Games Trainers Play: Experiential Learning Exercises

Edward E. Scannell, John W. Newstrom (Contributor)/Hardcover/Published 1995

Even More Games Trainers Play: Experiential Learning Exercises

Edward E. Scannell, John W. Newstrom/Paperback/Published 1994

Games Teams Play : Activities and Workouts for Developing Productive Work Teams

Leslie Bendaly/Paperback/Published 1996

Games Trainers Play

John W. Newstrom, Edward E. Scannell (Contributor)/Paperback/Published 1989

House of Games : Making Theatre from Everyday Life

    Chris Johnston/Paperback/Published 1998

More Games Trainers Play: Experimental Learning Exercises

    Edward E. Scannell/Paperback/Published 1983

Playful Activities for Powerful Presentations

    Bruce Williamson/Paperback/Published 1993

Still More Games Trainers Play: Experiential Learning Exercises

    Edward E. Scannell(Contributor), John W. Newstrom/Paperback/Published 1991
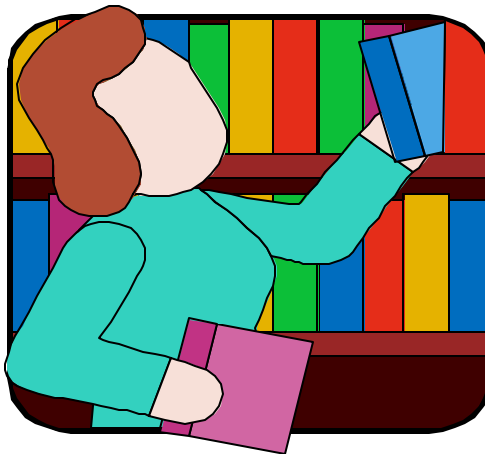
PREPARING TRAINING

PIKE'S P'S

Proper Preparation and Practice Prevents Poor Performance

1. Learn All You Can About The Participants BEFORE The Training Begins.

2. Prepare Your Training Delivery or Lesson Plans (see separate training note on lesson plans)

3. Prepare the Materials and Equipment You Need

4. Prepare Your Physical Space

5. Prepare contingency plans for each lesson

6. Discuss flow of module with your co-trainer

7. Practice out loud, if possible, with a live audience or co-trainer
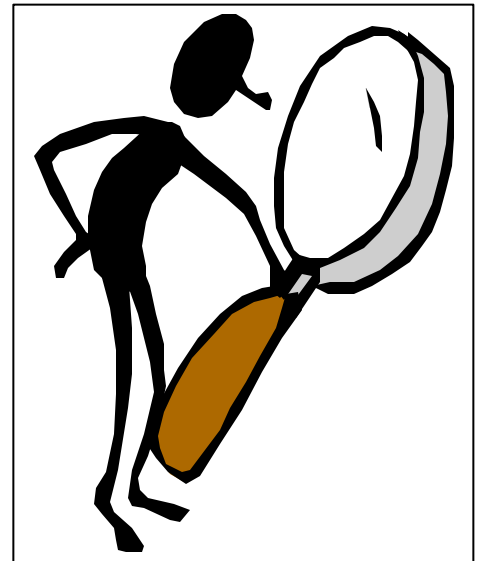
Learn All You Can About The Participants BEFORE The Training Begins.
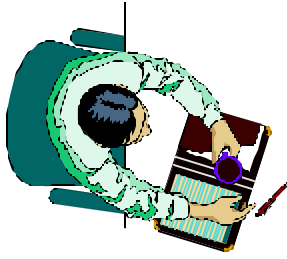
It will help you decide how to pitch your course, what level of materials to prepare, and exercises and games to use which have resonance for participants.

It will also prepare you for certain cultural sensitivities.

It will also allow you to plan to use students who have expert knowledge to benefit all participants.

Useful information includes:

➢ Where are they from (geographic/cultural sensitivities)?

➢ What do they care about, love or hate (sports, current affairs, religion etc.)?

➢ What level of practical experience do they have? What is their skills and knowledge base?

➢ Where do they currently work? What is their title?

➢ Why have they decided to attend the training (voluntary or mandatory)?

➢ What do they want to get out of the training?

   Always reconfirm this during the initial training session. This is an opportunity to connect with participants and to make certain to be clear with them about training content and expectations.

➢ Other details (e.g. are they very religious, do they have deep knowledge of an area of business that you can build into your course).

Prepare Your Physical Space
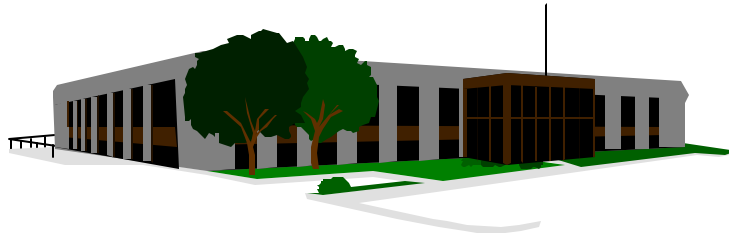
➢ Go to the training site well before the training begins, if possible the day before.

➢ Ensure that the space is conducive to learning (space, light, temperature)

➢ Room design will impact on learning and needs to change for different methodologies.

➢ Ensure that there are electrical outlets for equipment and adequate white-boards and flip charts or other equipment. Test to make sure all equipment works.

➢ Set up the room in a manner that will be conducive to your style of training, and that you are comfortable with. A U–shape or rounds, usually facilitates a more interactive type of training. It also provides space for the trainer and role plays etc.

➢ The tables should have water pitchers and mugs. Make sure you are aware of the cleaning schedule.

➢ Ensure that help will be available on the first day if you need anything (e.g. a change in the temperature or help with a burned–out overhead projector lamp – this happens often!!)

➢ Confirm whether you will be sharing the facility during other times of the day.

Prepare Contingency Plans For Each Lesson
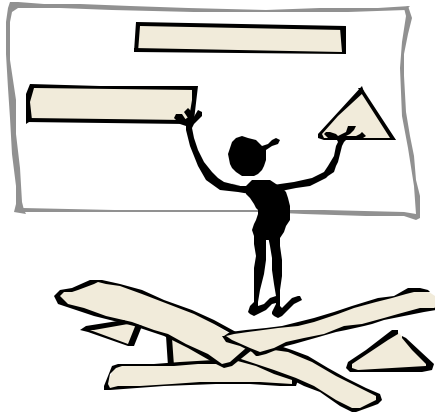
➢ Bring extra examples to illustrate complex calculations or subjects. This way you won't be caught off-guard if you need to explain an item in another way.

➢ Prepare something to do at the end of the day if you are running ahead of schedule.

➢ Prepare a number of extra games, mood-changing activities in case students need a break or energy in the class is low.

Practice Out Loud…
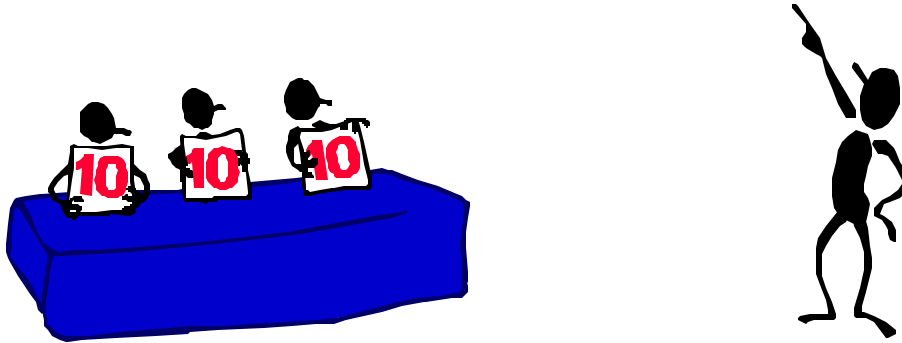
- **ideally with a live audience (co-trainer, friend or colleague). It will help you identify the areas of strength and weakness of your training.**

- **ideally, at least once using the equipment you plan on using (this way you check the slides are in order and become more comfortable with the technology etc.)**

- **ideally, at least once in the room where you will actually be doing the training.**

LESSON PLAN PREPARATION

Prepare Your Training Delivery or Lesson Plans

Before making the lesson plan for the class, identify who your audience is and what your objectives are. Once you know the objectives, make a decision on what training styles and equipment you will use, and how you will measure the end results of the training. If there is training before or after your lesson it is important to consider fit and flow of materials.

If necessary, incorporate actions expected from the class and measurements of the outcome into the main plan.

The main plan consists of four main sections (see example on next page):

➢ <u>Topic</u>: The main sub-categories of your material for the day.

➢ <u>Contents</u>: The key issues under each sub-category that you want the class to learn.
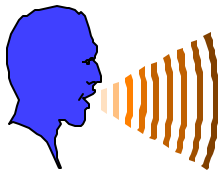
➢ <u>Style/technique</u>: Teaching methods that you will use. When you will talk; when/how you will elicit discussion, exercises, role-plays or case studies.

➢ <u>Timing</u>: The time you allocate for each of the day's main activities. Allow extra time for complex topics and highly interactive sessions.

The sample lesson plan of the first section of Advanced Module 1: <u>Introduction to Sustainability,</u> is given below. A blank template follows for your use.

Topic	Content/Key Points	Styles/Technique	Timing
1. Organizational issues	a) Physical space, b) Participation issues c) Teaching methodology assignment	• Explanation by the trainer	10 min
2. Introduction to Sustainability	a) General characteristics	• Demonstration of an object (e.g. song), that makes you think about the main general characteristics • Summing up with the students' help • Introducing essential financial and marketing sides of an MFI and asking the students to characterize them • Summary description	5 Min
	b) Essential characteristics	• Technique: controlled questions/answers conversation	20 min
3. Why we talk about Sustainability	a) Importance of the topic for MFIs	• Questions/answers, discussions	5 min
4. Strategy of Alignment	a. Alignment of goals, strategies and context	• Explanation with illustrations • Technique: using slides • Team work in decision making	5 min
	b. Practice exercise	• Controlled/free discussion of the alignment decisions	20 min
5. Levels of Sustainability	a) Four levels of sustainability: main characteristics	• Explanation • Questions/answers – cross communication • Exercise for individual calculations of sustainability	10 min 15 min 10 min
6. Completing the section	a. Summary of key points discussed earlier	• Students discuss in pairs the four things that struck them most about sustainability • Trainer elicits responses and fills in gaps where necessary to summarize substance discussed.	8 min 12 min
7. Total without breaks, with 30 min break at 10.15am			120 min 150 min

Exercise:

Using the summary <u>lesson plan</u> template below, design a two hour lesson plan for <u>overcoming career burnout</u>. Also fill in the following:

Objectives of Session:

Desired Outcomes of Session:

Contingency Plans for Session (e.g. back up games and exercises etc.):

Tools/Equipment needed for session:

(do not fill in the column on content/key points for the purposes of this exercise)

Topic	Content/Key Points	Styles/Technique	Tools	Timing

Some Ideas For Lesson Plan For Overcoming Career Burnout

Topic	Content/Key Points	Styles/Technique	Tools	Timing
Trainer to choose Icebreaker/Warm-up	(May or may not have relevance to content being taught)	Participative, and light in nature. Set mood for the day. Use movement and sound		5 min
What is career burnout?	Personal definitions? Characteristics of person with burnout. Discussion of how it feels. Working definition	Group discussion facilitated by trainer. Mime: Ask two more extroverted students to come to the front of the class and do a mime of a person who is burnt out. Discussion: Ask what it feels like	Use flip chart	15 min
Recognizing the signs of burnout		Individual exercise – self-analysis: students write down when they believe they have been burnt out (or noticed someone else burnt out)	Flip chart, white board, pens	10min
		Group brainstorm on signs of burnout		5 min
		Role plays of manager approaching employee whom he has recognized has burnout		15 min
Ways to prevent burnout		Small group exercise to come up with group's top 7 ways to reduce burnout at company X. Could be done as an advice memo to staff from the Human Resources Department.		15 min
Ways to overcome burnout		Group presentations to class		15 min
Energizer (if needed)		Interactive – throw two tennis balls simultaneously around class – stretches of other movement		5 min
Burnout prevention and management action plan		Individual exercise: individuals write up the things they will be doing more of, less of, and doing differently next month to manage burnout.		15 min
		Sharing ideas in pairs		10 min
Wrap up and summary				5 min

DELIVERING TRAINING

SUGGESTED TRAINING TIPS
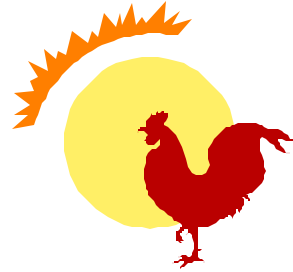
Beginning The Day

➢ Arrive early and greet participants as they arrive

➢ Begin the lesson with confidence. First impressions last a long time.

➢ Be sure to begin with a brief review of the plan for the day or session.

➢ Make sure everyone can see and hear you. Be convincing. Use your body to communicate. Move around in the class. Use common terms and do not speak too fast. If the trainer speaks to slowly, students will easily be distracted.   Use humor as freely as you can. If you let the class know you are open they will be as well. Humor is a sign of being relaxed. Humor is not telling a joke.

➢ Introduce yourself and let participants introduce themselves. Another alternative is to have a game for participants to introduce themselves.   This relaxes the atmosphere and engages everyone immediately. Examples include:

- Let students introduce themselves with their name, organization, and two, short truths and one lie. The class should guess the lie. Or

- Let students talk to the person next to them and then introduce that person to the rest of the class. Or

- Students walk around the room and find three things in common with other people (the more unusual, the better) other than doing microfinance.

Keep in mind that interactive introductions take longer than expected, so plan for it. This is a great time to hear again, more about your audience and their expectations.

➢ Making "Ground Rules:" Let participants brainstorm in class what rules they would like to frame the next couple of weeks during the course. The trainer could add to the rules. All rules should be written on flip chart paper and pasted in a very visible place in the room.

Typical kinds of rules include:

- Participate and Having Fun. This is very important. Everyone learns best when they are enjoying themselves. And the trainer is far more effective when he/she is having fun too. This is probably the most important ground rule!

- Treating one another with respect. Honor airtime

- Arrive on time and end on time

- Come prepared for class when necessary

- Participate actively and listening to one another (not interrupting)

- Constructive feedback only; no judging

- Leaving all other concerns and worries at home (an activity we used is to let everyone write their concerns and worries on a piece of paper and to put it into a sealed envelope, which was returned to them, at the end of the course).

- The only stupid question is the one you don't ask.

➢ Let the class know that you encourage active participation and that that there is no such thing as a stupid or wrong question. Illustrate both these ground rules as quickly as is convenient to confirm your openness.

➢ Put up a board on the wall (cardboard) for people to write comments on (a parking lot).

➢ Have a private suggestion box where participants can anonymously write comments or suggestions to the trainer. Use both

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oral and written evaluations.

➢ Select a timekeeper for the day and give them the clock (see section on time below).

➢ Introduce the course and the course objectives **OR**, ask students what they would like to get out of the course. Write up their comments and reflect on them briefly when everyone has had a chance to say something.

➢ Do a full introduction of the course and begin the lesson of the day. It is important for students to feel like they came away with new knowledge right from the first day. If a participant has an expectation you will not meet say so up front.

Timing Tips:

➢ Start ON TIME from the first day.

➢ END on time from the first day.

➢ WATCH the time throughout the day so you can reorganize materials, if necessary, to allow you to end the day in an unrushed manner on a strong note.

➢ When students agree on 'GROUND RULES,' their commitment to be on time should be one of them. Be sure to model this behavior.
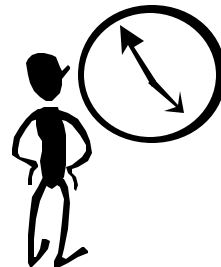
➢ BREAKS should be set at a regular time AND stuck to.

➢ Be aware that HIGHLY INTERACTIVE SESSIONS and complex subjects take more time.

➢ Prepare a detailed TIME PLAN with your lesson plan – Be prepared for it to change.

➢ Ask a different student each day to be timekeeper. It is their responsibility to announce when it is time for breaks. They are also responsible for making sure students come into class immediately after the end of the break. The student should be given a clock.

Affirmation

<u>Creating and Maintaining the "YES" Mode</u>

Maintaining an optimum learning state requires constant reinforcement and subtle suggestion through the use of positive language, reassuring self-talk, and supportive feedback.

Learning to speak positively and rephrase negative thoughts is a fundamental skill of creating and maintaining an energized learning environment.

Ways to stimulate a "YES" Mode:[5]

Learners to themselves	Write down and achieve goals; recall past learning experiences that the learner found very positive; see, hear, and feel progress.
Learner to learner	Design activities and rituals during which people share positive information and feedback with each other; encourage teamwork, mentoring, peer coaching, and recognition.
Learner to role models/best practices	Talk, watch, or listen to the best. (This supplies the evidence that learning can achieve desired results.)
Learner to trainer	Ask people to demonstrate and contribute to the learning; have people show physically that they have learned (e.g., nodding their heads or putting their hands up to signal "yes").
Trainer to learner	Role model a commitment to the learner's welfare; demonstrate what is expected by exhibiting the competencies that are required of the learner.

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[5] <u>Creating Training Miracles,</u> Alastair Rylatt and Kevin Lohan, Pfeiffer, 1997.

Celebration

Celebration of learning feats and discoveries can greatly enhance the teaching and learning experience. Celebrations engage the conscious awareness of achievements and also anchor the more subconscious feelings of well-being. There are essentially two ways to celebrate:

Orchestrated Celebration:
A trainer can include rituals in which people either share their discoveries or reward themselves or others for reaching a milestone within the program.

To be useful, these celebrations should be exciting and inspirational and should clearly profile what has been assimilated. Warming learners up to celebration is important. It takes time and trust for people to feel like celebrating.

Celebration rituals can vary from simple sharing of learning results to more innovative and fun examples like the following:

- Award ceremonies

- Plays

- Video productions and songs

- Course newsletters and photography sessions

- Closing dinner parties

Spontaneous Celebration:

As the name suggests, this occurs in the spirit of the moment. It is up to the trainer to help capture that moment. For example, if a student has a wonderful idea to enhance a learning experience, the trainer could embrace it, praise the student for the effort and initiative, and encourage everyone to utilize the idea in their daily learning experiences.

OPENING AND CLOSING LESSONS

Introducing or Opening the Lesson

It is useful to use an interesting teaching technique to engage students immediately in the subject matter of the lesson. Again humor and interaction send a message of openness.
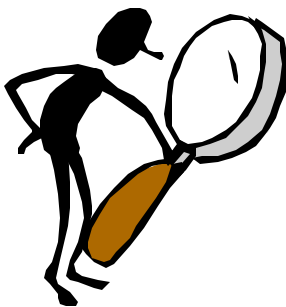
The way a trainer begins a lesson should take them closer to reaching their objectives. The trainer should be very clear on her/his objectives of the lesson and the outcomes he/she wants to achieve by the end of the day.

Impressions on the first day are very important. In fact, everyday, the first couple of hours will set the tone for the entire day and possibly the training.
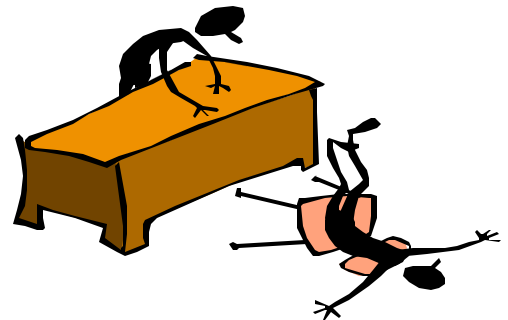
Ideas to begin a lesson include:

- Telling a personal story or experience that relates to the topic

- Asking the class provocative questions

- Making a startling or surprising statement and asking for reactions

- Asking participants for the first three things that come to their mind when they think about the topic you give them.

Remember to:

- Use eye contact

- Move around comfortably, rather than being fixed in one spot

- Reinforce central ideas through examples

- Listen to students and facilitate discussion

- Use humor

- Use clear visuals and teaching aids

- Bridge to class experiences from previous sessions

- Use a variety of teaching methods (role plays, games, individual and group exercises etc – see separate teaching note for a list of different methods)

Final Moments

Closing a Lesson
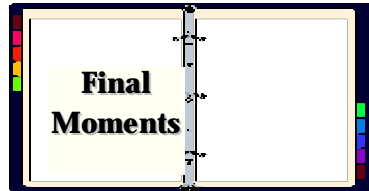
The conclusion of the lesson should be planned ahead of time to avoid abrupt endings when time runs out, or when the trainer runs out of things to say.

It is useful to let the class summarize the key points of the day. Alternatively, if there is less time, the trainer can do the summary. Use questions to elicit additional points. The trainer can use flip chart paper and paste it on the wall after class for students to reference.

Closing a training session or lesson need not be longer than a couple of minutes.

Components of the closing may include:

➢ A summary of the key points done by the teacher or students. For example, each student could highlight the most important point he/she learned.

➢ A reminder of the objectives of the training session and plans for the next day.

➢ A brief time for participants to share reflections on the day.

➢ A comment on the usefulness of the lesson.

This does not mean a comment, which says, "this is very useful for you." The comment should tell students how what they learned can be applied to their work situation. The teacher could ask one or two students how they think they will use the information and skills they learned.

Some creative ways to close a session include:
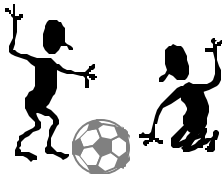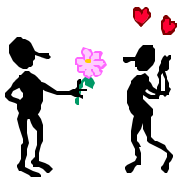
1. Small groups doing a series of key learning points on flip chart paper

2. If all the questions that the participants asked were put up on flip charts around the room, then a useful closing is to ask participants to retrieve the questions that they thought were answered during the training. Ideally the wall should be empty. A few non-related questions may remain. If something important was left out, the trainer should undertake to answer it the following day.

3. Reflections: Ask three (or all participants) volunteers to reflect on:
▪ What they like most
▪ What they may use most in their job in the future
▪ One learning point that struck them strongly.
   An exercise which is helpful is plusses and wishes where you invite the participants to share what worked and was helpful and what they would like to change.

It is sometimes useful to use humor in the closing, especially if it was a difficult session (e.g. use a funny quote, an anecdote, a joke, or a poem).
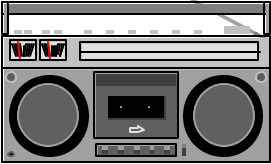
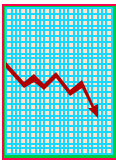Remember some form of written evaluation is helpful separate from class discussions.
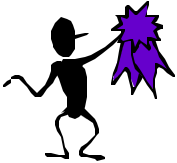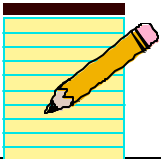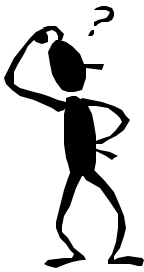
IDEAS AND USES FOR DIFFERENT TEACHING METHODS

Suggested Method	Example of Use
Warm-ups and ice breakers, energizers and games	Useful to set the mood for each day. The training manuals referenced at the back of the 'experiential learning' teaching note have lots of ideas for icebreakers and warm–ups. Often, they can be used to make a teaching point. But it is fine to use them simply for fun as well. Physical ball games for a few minutes in breaks often refresh students. Use fun ways to get participants into groups, for example: ▪ Give participants part of a puzzle. They have to find other participants to make the puzzle whole. Each puzzle is one group ▪ Give five participants a sheet with names of a famous actor, another five the names of politicians, another five the names of sports heroes. Each participant has to wear their new name and find others who belong in their group.
Roleplays	See separate teaching note on role plays Great to bring simple props and encourage students to use props in the class room (e.g. furniture, different clothes etc).
Exercises and problem solving.	Exercises are useful for calculations. Students can work in pairs or small groups. They can also be used for other learning points, which require thought and usually benefit from more than 'one head.' For example, students could be asked to write up a job description and job expectations for a loan officer. They could be asked to design a new savings product and marketing strategy.

Five minute stretching	When the class is restless or tired.
Problem solving	Problem solving is a good teamwork exercise, for example, students can be given specific scenarios (like assessing why loan volume has been decreasing in organization X and producing a plan to deal with the problem).
Computers	Useful for financial modeling exercises, or for interest rate calculations. Adds some variety since students usually move to another training room.
Going to the field	Visiting MFIs and/or their customers helps students understand the application of what they are studying. It also may give them a chance to practice their skills in a safe environment. These visits should be very well planned for maximum success.
Poems, jokes anecdotes, quotes, personal stories, short story about someone else.	Sometimes useful for introductions and conclusions of lessons. The teacher could set up a "poem of the day" or "quote of the day" which could have resonance with the subject material, unless it is used as a 'mood-breaker' with no substantive learning objective.
Shock tactics	Saying something surprising or daring in front of the class to elicit a response. It often changes the mood of a class and brings on laughter.

Using guest speakers (MFI experts, practitioners or people with specific skills – e.g. a marketing or sales person – even though' the selling loans	Sharing real life work experience. Very useful for complex or boring topics. Useful to show how theoretical knowledge is applied and adapted. Good to get speakers who are MFI managers (if the class is mainly managers), or loan officers (if the class has some loan officers). MIS speakers can also be good. Need to brief speakers well. Make sure that the speakers you choose have good communication skills.
Using specifically skilled students to prepare presentations and make more substantive contributions.	While all students should be given adequate "air time" in class, it is useful to use the "stars" in a 'teacher-like' capacity. For example, they can help you walk around the class and help students with calculations, or they cam present a portion of the lesson. This often prevents these students from being bored, and helps them to feel valued. If their input is good, other students often appreciate the variety.
Listening to music, watching a video, video taping students.	Videos are great to show real life MFIs. Video taping students will help them, for example, improve their videoing skills. Music, adds variety to a class. Songs like the Beatles "it's a hard day's night" after a very difficult exercise can be fun. Perhaps music can be used during student breaks. See *Advanced Module 1* on sustainability for another music application, which is more related to the substance of microfinance.
Use flipcharts, transparencies, LCD panels, posters white boards.	Be comfortable using a variety of teaching tools. Flip charts are great for small group work, and writing up summary or key points that can be pasted up in the class. Black and white boards can be used for calculations. Slides are good for prepared presentation materials.

Teaching outside or encouraging group work to be done outside.	If the weather permits, it is useful to change the training venue every now and then to add interest and a change in pace for the class. Students generally appreciate it.
Competitions and prizes	Can be used for fun games, or more substantive contests (like for the group that delivers the most innovative strategy to increase the number of long-term savings deposits at a MFI. Useful to have small prizes. For example, tossing out a chocolate to the most creative role play participants or the 'best' problem solving group is fun and encouraging. Wherever possible, participants should vote who should get the prize.
Use teamwork	Students are less inhibited in smaller groups. Can encourage healthy competition. Good to use when teacher wants cross-learning and problem solving to occur.
Journal	Students could keep a one page journal each day to write about one or two things that struck him or her most during the day's activities. These could be handed into the trainer daily.
Quotes, sayings, mnemonics	Teacher could put a saying on the board each day. It may reflect a lesson, or a truth, or a controversial comment about the topic being taught. It may simply be something humorous to set the mood for the day. Mnemonics could also be used for fun and to memorize important concepts.
Graphs	The cliché a picture is worth a thousand words, is often true. Especially if the point you are making can very easily be displayed on a chart or graph (e.g. the relationship between loan volume and sustainability, etc.). Be sure to label it well.

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Reflections	At the end of many training sessions, the trainer could use a simple activity that combines self-assessment, action planning and personal reaction. Put the following on a flip chart and ask a couple of students to respond: ▪ The most important thing I learned in this session is… ▪ As a result of this training, one thing that I am going to do is… ▪ What I liked best about this training session was…
Posters	Display posters of quotations related to the topic. Display posters of questions asked and at the end of the day, ask the class if all relevant questions were answered
Open-ended and close-ended questions	The art of asking questions is central to your success as a facilitator of adult learning. Different types of questions obtain different results. Open-ended questions prompt people to express and opinion and answer more broadly. It is a useful way to get discussion going, but the trainer has less control over the way the discussion flows. Closed-ended questions are asked when the trainer wants to elicit an explicit response, rather than stimulating a general discussion. Closed ended questions are less interactive, but the trainer usually has more control. The trainer should be quiet for 10 seconds or so after asking a question to give participants time to think of a response.

Case Studies	Very useful for problem solving and for integrating the substance learned over the course. Gives real life situation. Often great exercise for groups. Must allow sufficient time. The trainer should test the case study on someone before giving it to the class so that refinements can be made. Instructions to the class should be clear, and enough time should be given to participants. The trainer should also prepare thoroughly for debriefing on the case-study as it is during this period that most learning often takes place.

TEACHING NOTE ON ROLE PLAYS
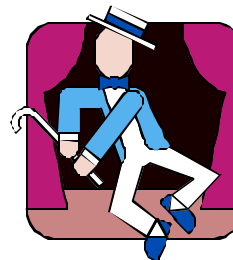
Role plays are a form of experiential learning where participants 'learn by doing.' It is an opportunity for participants to act out a lesson or skill.

The facilitator gives students a role to act out with a particular situation or problem they need so solve, or behavior they need to adopt.

Through role plays, students develop a practical understanding of the issue, as well as experience in dealing with similar kinds of situations.

Discussion of role plays, after they have taken place, often yields great insights by other students.

Why use role plays?

➢ To have a fun class: students love seeing their fellow students take on roles and act out parts

➢ To allow learners to practice skills in a safe learning environment

➢ To give students a chance to solve a problem, or to demonstrate how something should or should not be done

➢ To allow the exploration and practice of new behaviors

➢ To provide a chance to revisit past behavior to confront challenges

➢ To get class participation going, or to give students a taste of a real life experience

➢ To promote new ideas, strategies and values to improve performance.

When do role plays work best?

➢ Role plays work well when the subject matter being taught deals with interpersonal skills, like selling a product or interviewing a customer.

➢ Almost always, they are used to demonstrate real life situations. Even though the circumstances may be imaginary (e.g. student is asked to sell his shirt, rather than a loan), the selling experience is a 'real life' one. The role play is thus rooted in reality. Often, role plays are exaggerated; but valid points still get made.

Typical steps in delivering a role play

➢ The facilitator describes the situation to the students

➢ The facilitator asks for volunteers or picks out students and assigns roles to them.

➢ The selected students then act out the situation. The rest of the class may also be given roles. The facilitator 'watches', rather than participates; but is ready to gently intervene if the scenario goes badly off-track and nothing useful can be gained from it.

➢ The facilitator or trainer should de-role and de-brief the role players.

➢ Either as a whole group, or in small groups, the class discusses and analyzes the results. The trainer facilitates the discussion.

➢ Trainer summarizes or evaluates and draws some key points or lessons from what was learned.

Students should take the role-play fairly seriously but still have fun. The trainer must be able to facilitate well, and find out what participants learned at the end of a role play exercise.

Different kinds of role plays

Role plays can be done in different ways. Much depends on how much control the facilitator wants over the exercise. Below are some options:

➤ Co-trainers plan a role play and ask students to analyze it. (high control)

➤ Trainers give students a chance to prepare a role play. (medium control)

➤ Trainers ask students to do a role play spontaneously. (no control, usually more fun)

➤ Trainer plays one role and gets student to play another. (medium control)

➤ Students from one group role-play. Another group comments. Get another group to do it differently or better, as a result of the feedback.

➤ A mirroring process is when a third or fourth person is brought into the role play. The third person may show one role player (the first person) the perceived impact of his or her actions on others. For example, if the first role player did something that is perceived as wonderful, the third person could stand to the side with outstretched arms in an open and large posture. This is a more complicated approach to role plays as it shows the effect of the role players on others at the same time as the role play is happening. (lower control)

➤ An intervention interview is when the role play is stopped short and other role players are interviewed for a short period of time.

➤ Role reversal is when individuals swap roles in the middle of the interview – medium control.

➤ A tag team is when two people are assigned the same role. When a role player gets stuck on what to do, an assigned double can take over by making a prearranged nonverbal signal (e.g. tapping the current role player on the shoulder).

➤ Dramatization involves people reading or playing out an actual script or story. (high control)

Tips for role plays

The manner in which the trainer introduces and facilitates a role play will, to a very large extent, determine its success. Even poor acting and crass mistakes by participants can yield valuable lessons. The trainer should:

➢ Introduce the role play with positive energy and conviction. It the trainer is apprehensive about a technique, the students will pick up on it and it will affect the capacity of the students to learn and discover. The trainer needs to communicate with confidence and excitement, sincerity and openness.

➢ Recognize when some learners need more structure and guidance for role plays. This will help allay the fear that some students may feel.

➢ Before introducing role play, be certain of the 'lessons' or outcomes that are be achieved.

➢ Remain open to discovering new unplanned outcomes and lessons that may emerge from the exercises.

➢ Wait until the end of the role play, which is followed by input from class participants, to make his/her summaries, comments, or links to other issues.

➢ Reduce participant anxiety by encouraging them to relax. The participants should be told that they are not being judged. Let them know that the idea of the exercise is to practice and that mistakes are fine.

➢ Always allow time for peer review and feedback.

➢ Conclude by discussing learning points, successes and failures. All feedback should be constructive.

Summary of Basic Steps for Role Plays

1. Design role play with a clear purpose.

2. Prepare script and clear instructions.

3. Brief the students.

4. Allocate Roles (the trainer is usually the director or facilitator, the role players get given parts, the rest of the class are the observers).

5. Set up activity and atmosphere (e.g. make music, lighting and other props available)

6. Oversee the role play (intervene only when play falls flat or roles are not being performed. Ensure observers are attentive

7. Debrief the role players and observers: Get participants to disconnect themselves from the role they were playing.

   Debriefing questions could include:
   - How did you feel you did in the role?
   - What did you do well?
   - What would you do differently next time?
   - How do you differ from the role you played.
   - What did you learn?
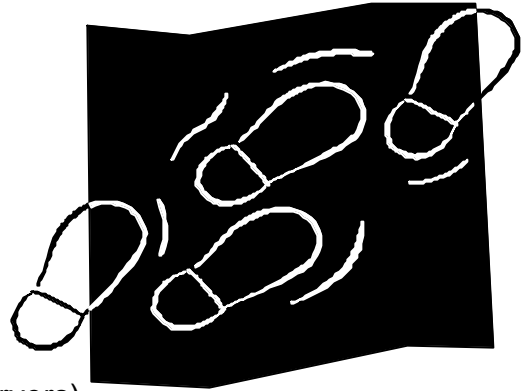
Suggestions for Removing Resistance to Role Plays:[6]

- Warm up the group by giving it a less threatening activity to do first: for example, hold a small-group discussion.
- Describe how this skill will help in many situations.
- Sell the benefits of the technique.
- If the term "role play" is causing discomfort, call the technique something else such as "activity," "try out," or "skill practice."
- Perform a demonstration yourself – show them what is expected.
- Make the scenario as realistic as possible.
- Show genuine sensitivity and tact, listening to people's fears, suggestions, and expectations.
- Ask for the learners to make this activity one of the most positive learning experiences they have ever had.
- Keep the activities short and sharp.
- Run a short presentation session detailing practical tips before starting the role play activity.
- Give clear instructions containing small steps and checklists.
- Stress that role playing is not about winning an Academy Award but that it is about making the attempt.
- Use music to set the mood for the activity.
- Allocate observer roles and regularly rotate people into different responsibilities.
- If you are using video equipment, introduce it during an earlier activity. Remove the pressure of the role-play ritual.
- Encourage deep breathing and stretching to help create a relaxed, supporting environment.
- Create opportunities to practice and learn.

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[6] Creating Training Miracles,, pg. 207.

Examples of Three Role Plays

Interviewing Skill Examples:

➢ Role play of owner of $1 million home interviewing a gardener for a job. The point here is for the home owner to discover the gardener's characteristics. (Is he/she honest, can he leave the house and feel safe, is the gardener skilled at his profession etc.)

➢ In a follow up role play, you could make the situation more realistic by making one person a loan officer and another a potential customer. The situation could be the initial screening interview of the customer.

Credit Analysis Example

➢ The trainer could give the borrower a detailed description of a specific business (without all the key information). The loan officer would elicit the information and decide whether or not to make the loan. The class could discuss afterwards what they would have done. The trainer would sum up the key learning points.

Fun Body Language Example

You probably know the cliché: "Actions Speak Louder Than Words." In other words, the signals and non-verbal communication that managers give their staff, or that loan officers give their customers will often have as much impact as what they say.

A fun role-play we used with the JMCC Microfinance Organization in Jordan was to select two men. We told the first participant (a man) to pretend that he was a gorgeous woman who was sitting by herself at a restaurant waiting for a friend. The other participant was asked to be a good-looking man who was looking for a wife. He was asked to make it clear using non-verbal signals to the woman (really, a male participant) that he was interested in her. And she was asked to respond in any manner she felt like.

The point of the exercise was really to show the power of non-verbal signals. We extrapolated it to the 'work situation' in an MFI and discussed, with the class, different types of non-verbal signals that they had perceived from their customers or managers.

Note: We deliberately used two men to avoid discomfort that may have been felt if we had selected participants of different sexes.
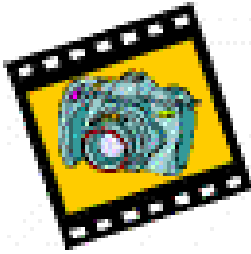
Training Tools

Trainers use many different kinds of tools. The table below highlights some of the common physical tools and equipment that trainers use.   Each trainer should make their own personal list and ensure all equipment is available before training begins

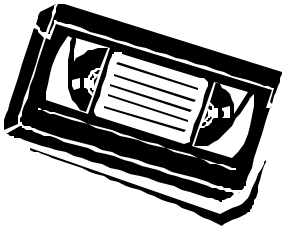| TOOL	EXAMPLES OF USE	COMMENTS
Black board/white board	➢ Displaying previously prepared information ➢ Writing down key discussion points ➢ Drawing diagrams and doing calculation	➢ Make sure you have an eraser, the right chalk, pens (different colors) and paper for the flip charts. (have an extra pad) ➢ Write clearly in big letters.
Flip Chart and Easel	➢ Pre-prepared visuals ➢ Use for small group work ➢ Write up key points	➢ Post flip chart paper on walls (need tape) ➢ Write clearly in big letters. ➢ Always have an extra pad of paper.
Masking Tape and Pens for Boards/Charts	➢ Stick up flip chart papers on walls	➢ Use dark and different color pens on white paper (not yellow). Have enough pens for small group work.
Name Badges	➢ Easy for trainer and students to get to each other ➢ Teacher can shift around name places to encourage mingling in the class	➢ Names should be in large print ➢ Students should choose how they would like to be addressed (nickname or full name or Ms. XXX etc)
Electrical Equipment (e.g.) Overhead and Transparencies (some clear) Projector/Tape Recorder/Video/ TV, etc.	➢ Display slides ➢ Use music as a teaching aid ➢ Video students role plays ➢ Show a video in class	➢ Make sure that there are enough outlets, double adapters and extension cords. ➢ Have a spare overhead light bulb ➢ Learn how to operate each of the machines before the course begins ➢ Know who to call if equipment fails.
Stationery Kit	➢ Trainees/Trainer may need stationery (paper/pen)	➢ Needs for pens, erasers, tape, scissors, thumb-tacks, staplers, etc. often arise
Clock	➢ Keeping to the schedule	➢ Cheap bedside alarm clock suffices
Water and Glasses	➢ Increasing comfort for participants and limiting disruptions	➢ One water pitcher usually for four students. Replenish during breaks.
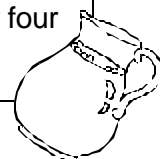
Summary of the Advantages and Disadvantages of various Visual Aids[7]

Aid	Advantages	Disadvantages	When to use
Chalkboards	- Spontaneous - Easy to use - Inexpensive - Erasable - Attention grabber - Breaks lecture monotony	- Slow - Temporary - Poor readability - Limited to chalk - Back turned to audience - Associated with school days - Messy	- Small, informal meetings - Spontaneous idea development - Brainstorming
Flip Charts	- Spontaneous - Advance preparation - Better contrast - Permanent - Easy to use - Portable - Allows ideas to be presented in sequence - Inexpensive - Range of colors available. Black and blue pens are best to make points. Red to emphasize. - Dependable	- Bulky - Limited to writing - No flexibility in size or sequence - Expensive if prepared - Tendency to write small to put ideas on one page - Papers tears easily - Ineffective if yellow pens used.	- Small groups - Lectures with spontaneous highlighting - Brainstorming - Lists, procedural steps
35 mm slides	- High quality - Photographic detail - Very portable - Easy to operate - Can accommodate any size group - Voice can be integrated - Trainer can use remote and move around	- Dark room - Usually expensive - Can appear "canned" - Slides become focal point, not speaker - Does not show motion - Long sequences encourage mental absenteeism	- Repetitive programs for which photographic detail and professional look are important - Training programs or product displays with sound and music added

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[7] The Trainers Module. Karen Lawson, 1998.

Aid	Advantages	Disadvantages	When to use
Overhead Projector	- Fast, simple preparation - Lights on - Speaker faces audience - Any size group - Spontaneous or advance preparation - Very flexible - Optional quality - Inexpensive - Exact illustrations can be portrayed - Easily updated	- Projector can block view - Less portable than slides - May make too "busy" because of ease of preparation - Tendency to overuse - Focus sometimes difficult to control	- Financial and technical - Sales presentations - Seminars, workshops in which speaker wants to maintain rapport
Videos	- Professional - Good discussion generator - Immediate feedback - Any size group - Effective for showing how not to act - Most effective for learner-centered training - Both sight and hearing are utilized "Expert" on tape reinforces message	- Dark room - Expensive - May be substitute for lesson or presentation	- Supplement to a training program - Visual feedback of trainee performance - Create mood or feeling as prelude to speaker's presentation

NOTE ON FORMING GROUPS OR TEAMS

The purpose of putting the participants into groups at the beginning of the training course, and, in which they could remain for the duration of the course are:

1. To allow participants with different backgrounds to learn from each other

2. To introduce a spirit of competition and teamwork

3. To break up individuals who work together all the time or to put common or different skill sets together.

The groups that work best for complex material are usually selected to mix participants with differing and complementary skills and experience and work settings. For example, most groups should have someone who is highly numerate, someone with a strong background in training and someone with direct experience in microfinance. The size of the group is important. Small groups of 3-5 people work best.

DEALING WITH
CLASS CHALLENGES

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Typical Challenge	Ideas/Possible Solutions
Class participation is low	Non verbal ways to encourage participation: - Make eye contact with all participants. - Nod head to show understanding and to encourage participation. - Avoid defensive postures such as folding of arms. - Move toward people to draw them into discussion. - Smile to help relax the group. Verbal ways to encourage participation: Use simple, but powerful words of encouragement - "I am glad you brought that up." - "Tell me more" - "Okay, lets build on that" - "Good point. Who else has an idea" - "I would like to hear your thoughts about…" Accept or Use Ideas: Clarify, build on, and further develop ideas suggested by other participants - "To piggy back on your point, Nazir…" - "As Rula mentioned earlier,…" Accept Feelings: Use statements that communicate acceptance and clarification of feelings - "I sense that you are upset by what I just said." - "You seem to feel very strongly about this issue."

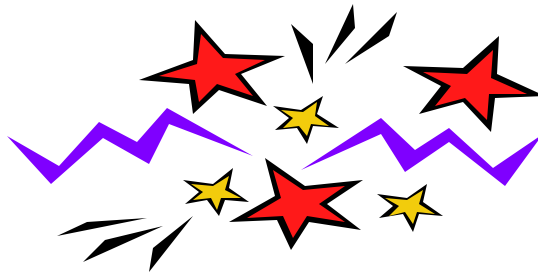|	
	▪ "I know it is hard to maintain a positive outlook when you are at risk of…" ▪ "I can imagine that you feel…" Ask more open–ended questions ▪ Questions that begin with a who, what, where, when, why and how usually require more than a yes or no answer. ▪ Beginning a question with 'why' usually puts people of the defensive. This is okay when students are confident and already participating actively. ▪ Pause for 10 – 12 seconds after asking a question to allow time for people to respond. Do not rush into answering it yourself if there is no immediate response. Only fill the void, if necessary. ▪
Handling questions from students	First understand WHY people ask questions: ▪ To clarify ▪ To obtain information ▪ To impress others ▪ To "get" or annoy the trainer ▪ To help the trainer ▪ To keep from going back to work Guidelines for handling questions: ▪ Set the ground rules on how questions will be handled at the beginning (e.g. if you encourage students to ask questions, you may need to limit the number of questions to stay on schedule). Sometimes you may wait until the end of a session. Other times, you may choose not to take questions. Always communicate the ground rules up-front. ▪ Repeat or paraphrase the question asked by the student. This does three things: 1) it ensures the rest of the group has heard the questions; 2) It ensures that you have heard the question correctly; 3) It buys a little time to organize your thoughts before answering. ▪ Use eye contact ▪ Choose words carefully. Do not be patronizing, condescending and never belittle or embarrass a participant.

	▪ Respond to individual concerns: If a question only pertains to one student, it may make sense to suggest discussing it with him or her after the session. ▪ Talk to all students when answering a question, not just the student who asked the question. ▪ Be careful not to focus on one side of the room when taking questions. We often do this without realizing it. ▪ Do not be afraid to acknowledge when you do not know the answer. Undertake to find an answer if possible. A useful tactic is to toss the question back to the class when you do not know the answer (it also gives the trainer a moment more to think). If you commit to finding out the answer, be sure to follow through at the very next training session.
Class motivation is low	▪ Try assessing why this is so. Understanding why they are at the course in the first place (were they forced, do they want to learn etc.) and what motivates them is important. ▪ It is up to the trainer to create an environment that facilitates motivation. ▪ A change in pace (using an energizer), or complexity of the topic, or teaching style is probably necessary. Shock tactics, games, lots of variety, roles plays etc. are useful. ▪ Putting the responsibility of learning on participants is important. ▪ Guided discussions and other discovery training styles work well in motivating adults. ▪ Give students assignments and responsibility so the onus of a 'great class' depends squarely on them. Get students to take on the personal responsibility of making the training a success. ▪ Give students positive reinforcement, encouragement and approval.

Dealing with resistance	Most trainers have to deal with some resistance from either individuals or even entire groups.
	
	• The first step to dealing with resistance is to recognize it exists. Not dealing with resistance will undermine the learning process.
	
	• Signs of resistance may include: asking antagonizing questions, not paying attention, not participating, not cracking a smile, etc.
	
	• Understand the cause of resistance to address it. For example, if participants:
	
	    ▪ ***do not want to be there***, open up discussion and ask them why they thought they were being offered this session. Try to show students how session will help them in their jobs
	    ▪ ***do not know why they are there***, explain goals and use opportunity to stress importance of communication in the work place.
	    ▪ ***have a personal issue,*** have conversation separately with participant
	    ▪ ***have a negative attitude towards the topic***, accept participant's negative feelings but explain why it is important for him/her as a loan office or manager to deal with the topic because of his/her responsibility at work.
	    ▪ ***are pushed out of their comfort zone***, trainer can support participants as they try new roles and test new skills.
	    ▪ ***have a literacy problem or language problem***, get participants additional assistance out of class, if possible. Be sensitive to these students in class.

Personal attack by a student	Try keep your cool: • Lower the pitch of your voice. • Breathe deeply. • Control your speed when replying. • Control your volume. • Avoid nervous gestures. • Deal professionally and calmly with the issue.

How to deal with the different personalities of participants	Here are some typical class participants:
	The talkative person, who is always volunteering and contributing etc: Appreciate his/her contribution, but suggest hearing from others. Suggest further discussion with her/him outside class
	The clueless person, who has no idea what is going on and comments inappropriately. Perhaps say, "something I said must have led you off track. What I was trying to say is…"
	The rambling person, who goes on and on about nothing: Ask to show how point relates to topic.
	The belligerent person who is openly hostile: Do not engage in verbal sparring. Perhaps say 'I understand and appreciate your point of view. What do others think? Usually someone else in the group will exert some pressure and bring them in line. You could otherwise suggest discussing the issue further in the break.
	The stubborn person. It is fine to say that you appreciate their view point; but for the sake of the group or activity, you are going to insist on moving on. Discuss later with participant, if necessary.
	The class clown. Usually this person is harmless unless you allow him/her to get out of control. It is fine to suggest "getting serious and concentrating on the topic."
General guidelines for coping with difficult class situations	1. Stop the dysfunctional behavior. This is your first objective 2. Keep the individual(s) engaged. Don't allow them to shut-down and not participate at all 3. Keep the rest of the group involved. Prevent others from shutting down as they will be judging the situation and the way you handle it 4. Respect the individual: This is most important. Do not embarrass them.

Learning to live with It	▪ *One of the biggest challenges the trainer faces is to accept the fact that some people and some situations are beyond his or her control.*
	▪ *When, despite all your efforts, the session still does not go according to plan, assess the situation as objectively as possible. Ask yourself what you could have done differently. If you conclude that you did all you could to prevent or handle the situation, then do not fret about it.*
	▪ *Accept the fact that people bring a lot of "baggage" to your sessions that you have no way of knowing about or controlling.*

EVALUATING A LESSON

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Evaluating a lesson helps the trainer to know:

➢ What worked and was successful, and why; and

➢ What did not work well, and why

The more specific your knowledge on your performance, the more you can improve for the next session.

There are two basic types of evaluation:

➢ **Formal** – where you ask students directly for feedback. Both teaching methodology and substance issues can be covered. Usually, if it is confidential, students will be more comfortable to give constructive criticism. The evaluation can be in the form of a written questionnaire or a test.

➢ **Informal** – where the trainer or co-trainer observes performance during the training. For example: was there active participation by all? Were students restless? Were they able to recap on key points, displaying comprehension of the lesson etc?
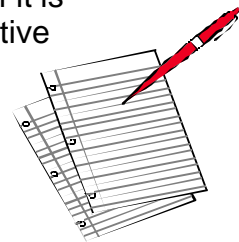
After the evaluation, the trainer should:

➢ Use this knowledge to adapt his/her training style and lesson plan for future training sessions. Areas to adapt may be:

- The pace of the lesson

- The degree of complexity

- The style of teaching

➢ Know better whether students understood the material and are able to apply it.

➢ Know whether the students are ready to advance to the next level of teaching and learning.

➢ Know areas where you, as a trainer, need to strengthen your performance.
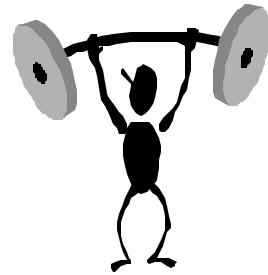
Once the trainer has evaluated the lesson, the revised plan and preparation for the next lesson begins; and so the process continues.

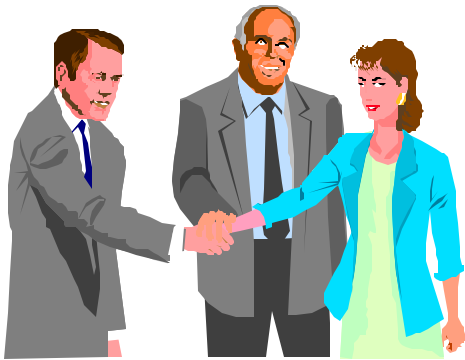# CHECKLIST OF DO'S AND DON'TS

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The Do's

Do prepare before training begins:

➢ Knowledge on participants

➢ The physical space in the room

➢ All the materials and equipment you will use

➢ The lesson plan

➢ Practice (see separate teaching note)
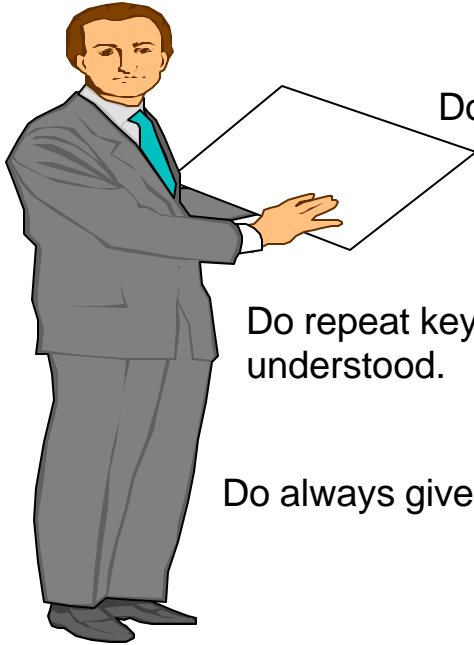
Do greet participants when they arrive.

Do student introductions on the first day.

Do listen to and affirm student responses

Do ensure that the ground rules and teaching objectives are set from day one.

Do speak clearly, confidently and with respect

Do move around the teaching area and use interactive teaching methods (sitting is also fine).

Do repeat key learning points and ensure that they are understood.

Do always give eye contact.
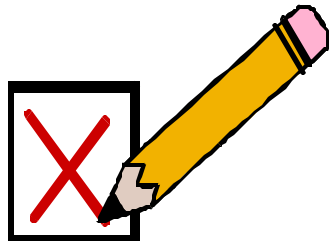
Do alter the frequency and depth of questions

Do use your body to communicate.

Do well-planned introductions and closing for each lesson (see separate teaching note).

Do acknowledge when you do not know an answer to a question that is asked.

Do evaluate the lessons performance and adjust the next day's lesson accordingly (see separate teaching note).
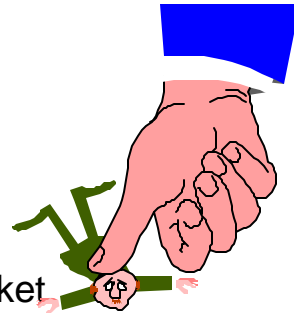
The Don'ts

Do not ever make excuses.

Do not be late

Do not favor particular students.

Do not treat anyone with disrespect.

Do not shuffle, fidget, play with coins in your pocket

Do not read your material.

Do not only lecture.